Arts Commerce and Science College Satral

Department of Commerce Organized

Four (6) Weeks

Certificate Course in Investment Planning

Objective :-

- To Keep funds safe and Secure
- To Grow your funds Exponentially
- To minimum Income tax burden
- Retirement planning

Jobs Opportunities (Outcome) :-

- Personal Financial Planning
- Client Service Advisor
- Wealth Management Advisor
- Portfolio Management Advisor
- Mutual Funds Advisor
- Share Market Advisor

ACSC SATRAL

Department of Commerce

Syllabus

Course Name :- '*Certificate Course in Investment Planning*'

(6 Weeks for Two Credits)

Given below are the 5 modules for the examination of course.

- Introduction to Financial Planning
- Risk Analysis & Insurance Planning
- Retirement Planning & Employee Benefits
- Investment Planning
- Tax Planning & Estate Planning
- Advanced Financial Planning

Sr.no	*Topic Name*	*Sub Topic*
1	Introduction to Financial Planning	• Establishing client- planner relationships • Objectives, Needs and Financial Situation • Implementing and Monitoring the Financial Plan • Financial Mathematics • Legal aspects of Financial Planning, etc.
2	Risk Analysis and Insurance Planning	• Insurance and Risk Contract • Legal principles in insurance • other property and liability risk exposures • Life insurance needs analysis and policy analysis • Medical insurance • Insurance of business risk, etc.
3	Investment Planning	• Issues in retirement planning • Group Life and Health Insurance

		• Retirement income streams • Post-retirement counseling • Reform proposals • How investment planning is different from selling investment products • Investment risk • Measuring and Managing Risk
4	Tax Planning	• Tax Planning Considerations • Tax Computations • Tax Planning Strategies • Estate Planning • Property documentation, etc.
5	Advanced Financial Planning	• Financial Planning Process • Risk management • Estate planning

References :--

1) *Investment planning Structure*
   Murali Krishna, Vaagdevi publications
2) *Computerized Accounting*
   Dr. G. Yogeshweran, PBP.
3) *Aakash Business Tools:*
   Spoken Tutorial Project IIT Bombay
4) *Implementing Investment Planning and Futures options*
   A.K Nadhani and K.K Nadhani, BPB Publications

Arts, Commerce & Science College, Satral IQAC

Prepared by	Checked by	Approved by	Approved by
Mr. V.K. Dighe	Mr. D.N. Ghane H.O.D. Department of Commerce Arts, Commerce & Science College, Satral	IQAC Coordinator IQAC COORDINATOR Art's, Commerce & Science College Satral, Tal. Rahuri, Dist. Ahmednagar.	Principal Principal Arts, Commerce and Science College At/Po. Satral, Tal. Rahuri, Dist. Ahmednagar. 413711